



*Executive Search*  
*Senior Director of Development for Catholic Schools*

**Position Overview**

Sterling Search Inc. has been exclusively retained to recruit for the new **Senior Director of Development for Catholic Schools (SDoD)** for the **Orange Catholic Foundation (OCF)**.

Background:

Through the inspiration of the Holy Spirit, OCF strives to become a premier, nationally recognized steward of Catholic philanthropy in carrying out Christ's work to sustain and enhance all aspects of Catholic life for the entire community of the faithful of Orange. OCF is an independent 501(c)(3) and an award-winning foundation with over \$70M under management, located on the Christ Cathedral campus in Orange County, California.

OCF helps support individuals, families, corporations, family foundations etc. with their charitable giving. OCF plans and conducts major fundraising programs and events, including the annual Conference on Business & Ethics, the semiannual Wills and Trusts Week, the annual gala and other special fundraising events. The Foundation manages endowments and other charitable long-term funds, providing grants always following donor intent in support of our Catholic community.

The Diocese of Orange was created in 1976 as an outgrowth from the Archdiocese of Los Angeles. It was a small organization at the time supporting, approximately 40 parishes and 500,000 Catholics in a rapidly growing Orange County community.

The County of Orange growth has exploded over the past 40 years and today the Diocese supports 62 parishes, 41 schools: 2 co-ed high schools; a girl's high school; 31 parish elementary schools; and 7 additional independent Catholic schools, in a community of 1.3 million Catholics, educating 18,000 students. Orange County, like the Diocese, has seen its evolution from a suburban community of Los Angeles to a much more urban, multi-cultural and diverse environment. This transformation impacts the nature of parish life and schools in profound ways.

OCF recently hired a new Executive Director, Kimberly Jetton, who is a national award-winning leader in fund development and gift planning. Prior to OCF Kimberly served as the Director of Major and Planned Gifts for the Archdiocese of Los Angeles executing strategic plans that exceeded fundraising goals year after year.

<https://orangecatholicfoundation.org/>

### **Position Overview**

The SDoD will report to the Vice President of Philanthropy and will manage the Associate Director of Development for Catholic Schools. General feedback and research from feasibility studies demonstrate that there is a compelling commitment by the Catholic community of Orange County, to advance and support its Catholic Schools. Having recently completed a highly successful capital campaign, there is a significant pool of donors who have capacity of \$25k+ for the SDoD's portfolio. This is a career making opportunity for someone who is passionate about catholic education and has a track record of closing gifts in the \$100k+ range.

The SDoD for Catholic Schools is responsible for securing between \$2M to \$3M annually in support of Catholic education (including endowment funds). This role involves organizing large-scale fundraising initiatives, working with board members and managing fundraising for Catholic Schools. The ideal candidate will have a bachelor's degree or equivalent experience, and a minimum of seven years of major gifts experience and have managed staff. Preferred experience with Raiser's Edge, NXT.

### **Specific Duties and Responsibilities**

- Plan and evaluate fundraising campaigns and activities including Catholic Schools Fund; Annual Giving Campaign for Catholic Schools; and Special Fundraising Events supporting Catholic Schools.
- Manage the department of Catholic Schools fundraising budget and revenue to ensure fundraising goals are being met. Develop and manage an annual expense budget supporting the school fundraising efforts and prepares monthly, quarterly and annual progress reports.
- Identify and steward current and prospective donors with a passion for giving individual annual gifts of \$25,000 and above.
- Supervise Catholic Schools fundraising staff.
- Identify, enlist, recruit and steward a Catholic Schools Fund Advisory Committee as part of the Orange Catholic Foundation specifically charged with supporting fundraising plans and assisting with identification and outreach to potential and existing donors.
- Keep current with fundraising trends in Catholic Schools and the nonprofit community.
- Regular communication with donors and staff via phone, in person, email, Zoom and social media in a timely manner.
- Use prospect research tools and Raiser's Edge to build fruitful donor relationships.
- Create solicitation campaigns and materials for the Catholic Schools fundraising team.

- Plan, design and implement donor research and prospect management systems to identify leadership giving prospects/donors for Catholic schools in order to engage with donors in an appropriate and timely manner.
- In conjunction with other development staff at the OCF, occasionally act as a consultant to pastors, principals, school development directors and school volunteers regarding their individual school development strategies.
- In conjunction with the Vice President of Philanthropy and the Executive Director, develop a comprehensive development and marketing plan for the Orange Catholic Schools Fund and endowment funds.
- Provides leadership and support to ensure the following key areas meet and exceed annual goals by collaborating, mentoring and developing new initiatives that raise funds through:
  - Individual major donors
  - Corporate sponsorships
  - Philanthropic grant proposals
  - Special Events and sponsorships with emphasis on the annual Conference on Business & Ethics
- Identify, qualify and manage a portfolio of 120+ prospects including advisory committee members. Specifically target major donors, corporations and foundations through cultivation and recognition efforts. This will be achieved by:
  - Conducting at least 15 documented personal visits with existing or potential donors, per month
  - Qualifying 15 or more new corporate, foundation or board prospects, per year
  - Soliciting at least 25 prospects of \$50,000, per year
  - Conducting a minimum 30 cultivation stewardship visits
  - Secure \$2 to \$3 million in individual, corporate and foundation support for programs and endowments per year
  - Collaborate with the Vice President of Philanthropy of OCF and the Executive Director of the Foundation on fundraising strategies, solicitations and stewardship efforts including managing a portfolio of donors with specific interest or affinity to support the Endowment goals

**Corporate and Foundation Relations:**

- Develop a case for support to share with corporations and foundations that explains the vision for Catholic schools, demonstrates the impact and benefit to Orange County employers of having a strong Catholic school system, and providing measurable data from the school's office to project the potential return on making an investment in our Catholic elementary schools.
- Ensure successful adherence to grant, sponsorship and restricted giving agreements.

- Establish long range institutional giving programs for sponsorships, corporate gifts and regional sponsorships.
- Develop and implement basic guidelines for sponsorship that will preserve the integrity of the Roman Catholic Diocese School “brand” and enhance its institutional identity as preeminent Catholic academic institutions.

#### **Special Events:**

- Be a co-leader on the planning, execution, solicitation and follow up for Orange Catholic Foundation’s Conference on Business & Ethics (CBE) which annually nets \$500k+ in support of Catholic elementary schools for outright tuition assistance granted to schools and to grow the School Tuition Assistance Endowment Fund. Specific duties include oversight in securing corporate and table sponsorships, providing support to the CBE committee and strategic management of fundraising progress to goal and serving as a representative leadership team in partnerships involving event chairs and planning volunteers. Lead on securing matching gift donors at the \$100k+ gift levels and leading the fund-a-need ask. An event planning firm hired by the foundation assists with the hotel contract, speaker arrangements and other logistics.
- In conjunction with the Executive Director and Vice President of Philanthropy of OCF, develop a comprehensive development plan for 2 annual special events to benefit schools that include clear strategy, follow up plans and return on investment.

#### **Development Strategies:**

- Regularly assess current funding streams and fundraising efforts, including individual and foundation giving opportunities; provide leadership to ensure initiatives are supported, revising strategies where appropriate.
- Collaborate with other members of OCF to define and continually upgrade a systematic and donor-centric fundraising plan, segmented by type (individual, corporate, foundation), level (subscription levels, various major gift levels, planned giving), and restricted for specific purposes, including education initiatives, programs and endowment).
- Collaborate with OCF staff to establish clear standards for stewardship, donor recognition, and sponsorship and gift acceptance policies with emphasis on branding guidelines, naming and other recognition opportunities.
- Ensure that information systems for school donor records use the OCF’s Raiser’s Edge and NXT fundraising data management system.
- Lead the development of collateral materials that relay the Catholic school’s mission and goals to donors and individual prospects in an impactful way that is consistent with the client branding campaign for school. Ensure that these materials are segmented and distributed in a targeted, regular, timely and consistent fashion.

#### **We are seeking candidates offering the following qualifications:**

- Bachelor’s Degree or equivalent work experience
- 10+ of development experience with an emphasis on major gifts

- 7+ years in a supervisory role
- Proven track record in successfully establishing and growing long-term relationships with donors.
- Established nonprofit fundraising experience with a sizable institution that includes event, major gifts and endowment elements; experience soliciting significant gifts from individuals, foundations, and corporations.
- Demonstrated management skills in motivating, directing and managing staff and consultants, and in coordinating and supporting the fundraising activities of others.
- Must be a self-starter who can produce results with limited oversight.
- A record of individual success in raising \$2M+ annually through major gifts from individuals, businesses, foundations, and corporations.
- Development director level experience with broad-based knowledge of various development activities including: proposal and grant development, direct solicitations, leveraging fundraising databases and support systems for donor segmentation, research and volunteer management.
- Ability to navigate a complex fundraising environment with nuanced strategies and initiatives, while building an effective group of volunteer fundraisers and gaining respect of community and business leaders and the advisory committee.
- A broad knowledge of brand marketing, advertising and public relations with specific experience in structuring corporate sponsorships; demonstrated success with establishing financial stewardship and donor recognition programs that sustain long-term relationships.
- A track record as an exceptional communicator, in writing as well as verbally; adept at writing proposals, solicitation letters, donor correspondence, and other materials.

#### **Personal Characteristics:**

- A devout, practicing Catholic who is familiar with the Church's structure, functions and ministries.
- A driven individual with a commitment to the mission of the Orange Catholic Foundation; a strong interest in raising support for and Catholic schools within the diverse communities of Orange County.
- Reflect official Catholic teachings and values in his/her personal and professional life by an expressed commitment and witness to the Gospel as well as respect for Catholic tradition through participation in community worship, and willingness to perform Christian service.
- A good listener and strategist; comfortable receiving input from many sources, and able to analyze and formulate disparate information into a sound, well-organized plan.
- A charismatic communicator, able to build enthusiasm for our Catholic schools' programs, and for innovative approaches that advance the reputation of our Catholic Schools in Orange County;
- Exceptional verbal and written communication skills.
- A proven leader with a high energy level; a "doer" with willingness to work hands-on in developing and executing a variety of development and advancement activities.
- Availability and willingness to outside of regular office hours, including weekends, attending special events.

- A bilingual candidate with proficiency in Spanish or Vietnamese is desirable.

**Compensation:**

- A competitive compensation package will be offered to attract an outstanding candidate. Range is at 120k-130k.

Please send resumes to:  
Sterling Search, Inc.



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Phone: 714-433-7040

**TO APPLY: [www.sterlingsearchinc.com/ocf](http://www.sterlingsearchinc.com/ocf)**

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Any resumes sent or telephone calls made to OCF will be redirected to Sterling Search

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